MBM Corporation

Order Guide Customization
User's Manual

Powered by Amphire Access

Amphire

Table of Contents

Order Guide Customization 3
Order Guide Categories 5
Create New Category 6
Delete Category 7
Rename Category 8
Resequence Category 9
Item Customization 10
Delete Item 11
Move Item 12
Resequence Item 13
Restoring an item from the Recycle Bin 14

Custom Sequence Order Guide Default 15

New and Deleted Items 16

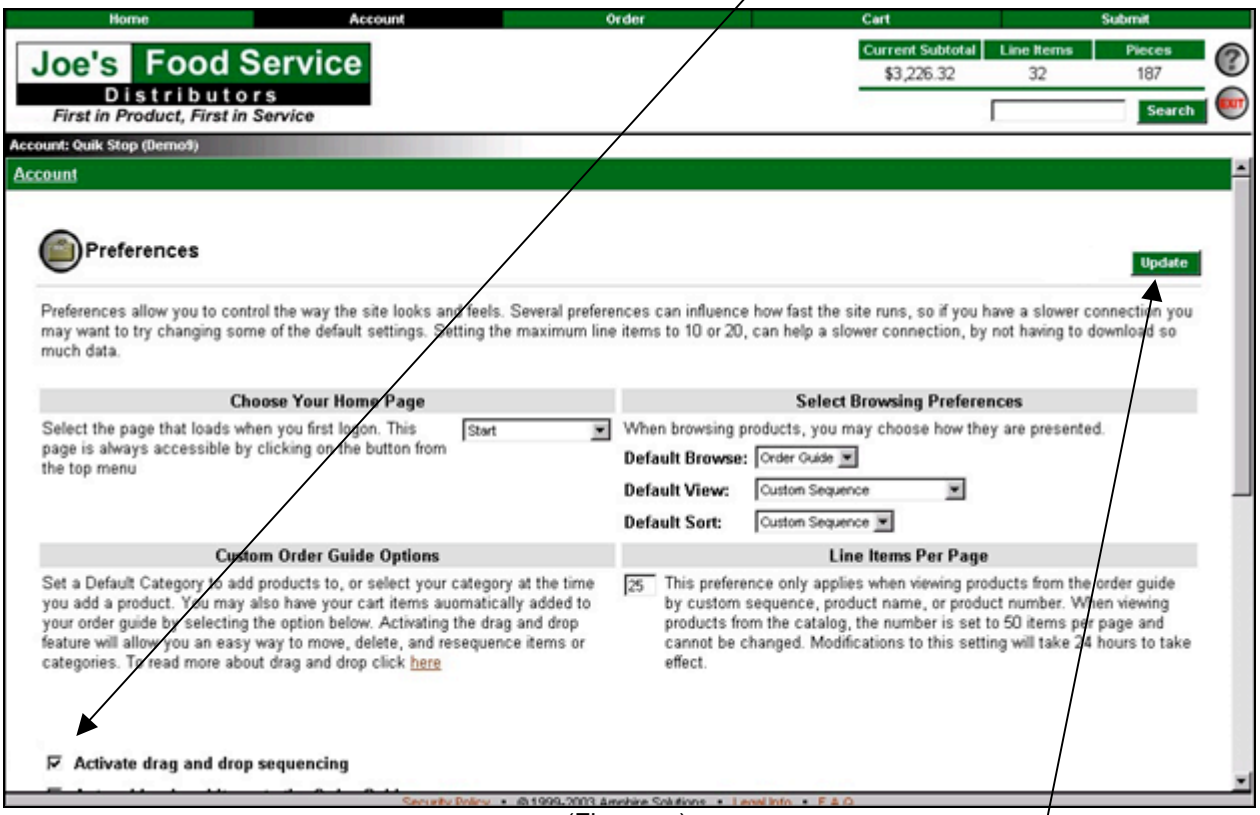
Screen layouts and headings may not be identical to your system.

Order Guide Customization

Order Guide Customization allows the user to modify the Order Guide to meet their needs. The user can Add, Delete, Rename or Resequence Categories and Add, Move, Delete and Resequence Items within the Categories.

The steps outlined in this manual outline the process of customizing an order guide using the 'Activate drag and drop sequencing'

To activate the "Drag and Drop Sequencing" on your account, select '**Account**', Select '**Preferences**', on the left side of the screen, click in the box next to '**Activate Drag and Drop Sequencing**'. (See Figure a.)


Home
Account
Order
Cart
Submit
Joe's Food Service
Distributors
First in Product, First in Service
Current Subtotal
Line Items
Pieces
$3,226.32
32
187
Search
Account: Quik Stop (Demo9)
Account
Preferences
Update
Preferences allow you to control the way the site looks and feels. Several preferences can influence how fast the site runs, so if you have a slower connection you may want to try changing some of the default settings. Setting the maximum line items to 10 or 20, can help a slower connection, by not having to download so much data.
Choose Your Home Page
Select the page that loads when you first logon. This page is always accessible by clicking on the button from the top menu
Start
Select Browsing Preferences
When browsing products, you may choose how they are presented.
Default Browse:
Order Guide
Default View:
Custom Sequence
Default Sort:
Custom Sequence
Custom Order Guide Options
Set a Default Category to add products to, or select your category at the time you add a product. You may also have your cart items automatically added to your order guide by selecting the option below. Activating the drag and drop feature will allow you an easy way to move, delete, and resequence items or categories. To read more about drag and drop click here
Line Items Per Page
25
This preference only applies when viewing products from the order guide by custom sequence, product name, or product number. When viewing products from the catalog, the number is set to 50 items per page and cannot be changed. Modifications to this setting will take 24 hours to take effect.
Activate drag and drop sequencing

(Figure a.)

Once you have checked the '**Activate drag and drop sequencing**' box, click the '**Update**' button on the top right of the screen. This will save your new order guide preference.

Screen layouts and headings may not be identical to your system.

To access **Order Guide Customization**, select **Account** → **Order Guide Customization** (*See Figure 1*)

**** The first time you access Order Guide Customization, after activating the 'Drag and Drop Sequencing', the web page will take some time to load.****

You will also receive a security warning from Amphire. Click 'YES' to accept

This security warning is only a one time event.

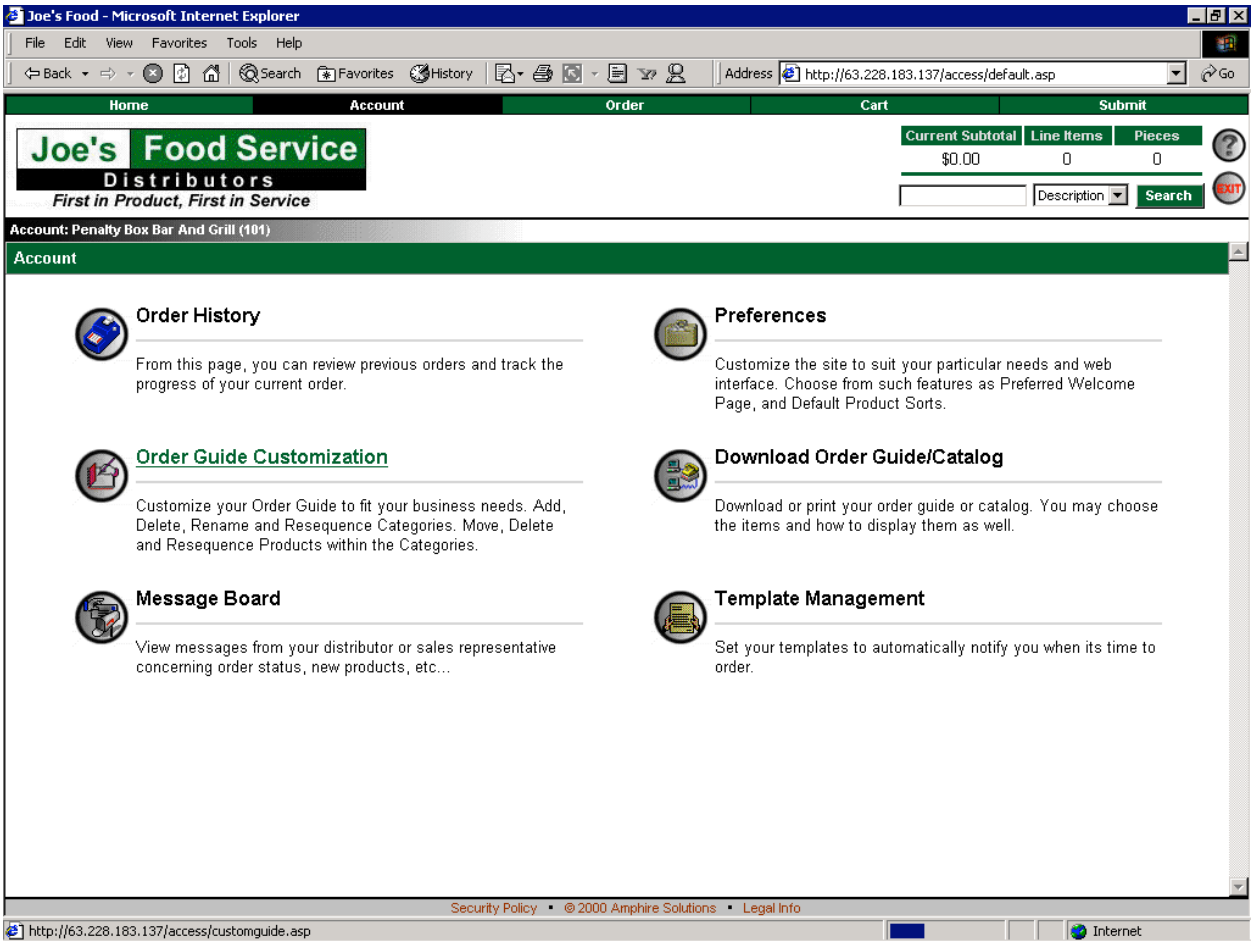

Joe's Food - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites History Address http://63.228.183.137/access/default.asp Go
Home
Account
Order
Cart
Submit
Joe's Food Service
Distributors
First in Product, First in Service
Current Subtotal
Line Items
Pieces
$0.00
0
0
Description
Search
EXIT
Account: Penalty Box Bar And Grill (101)
Account
Order History
From this page, you can review previous orders and track the progress of your current order.
Preferences
Customize the site to suit your particular needs and web interface. Choose from such features as Preferred Welcome Page, and Default Product Sorts.
Order Guide Customization
Customize your Order Guide to fit your business needs. Add, Delete, Rename and Resequence Categories. Move, Delete and Resequence Products within the Categories.
Download Order Guide/Catalog
Download or print your order guide or catalog. You may choose the items and how to display them as well.
Message Board
View messages from your distributor or sales representative concerning order status, new products, etc...
Template Management
Set your templates to automatically notify you when its time to order.
Security Policy • © 2000 Amphire Solutions • Legal Info
http://63.228.183.137/access/customguide.asp
Internet

Figure 1 – Account Page

Screen layouts and headings may not be identical to your system.

The Order Guide displayed will be the initial one setup by the Distributor. (*See Figure 2*)

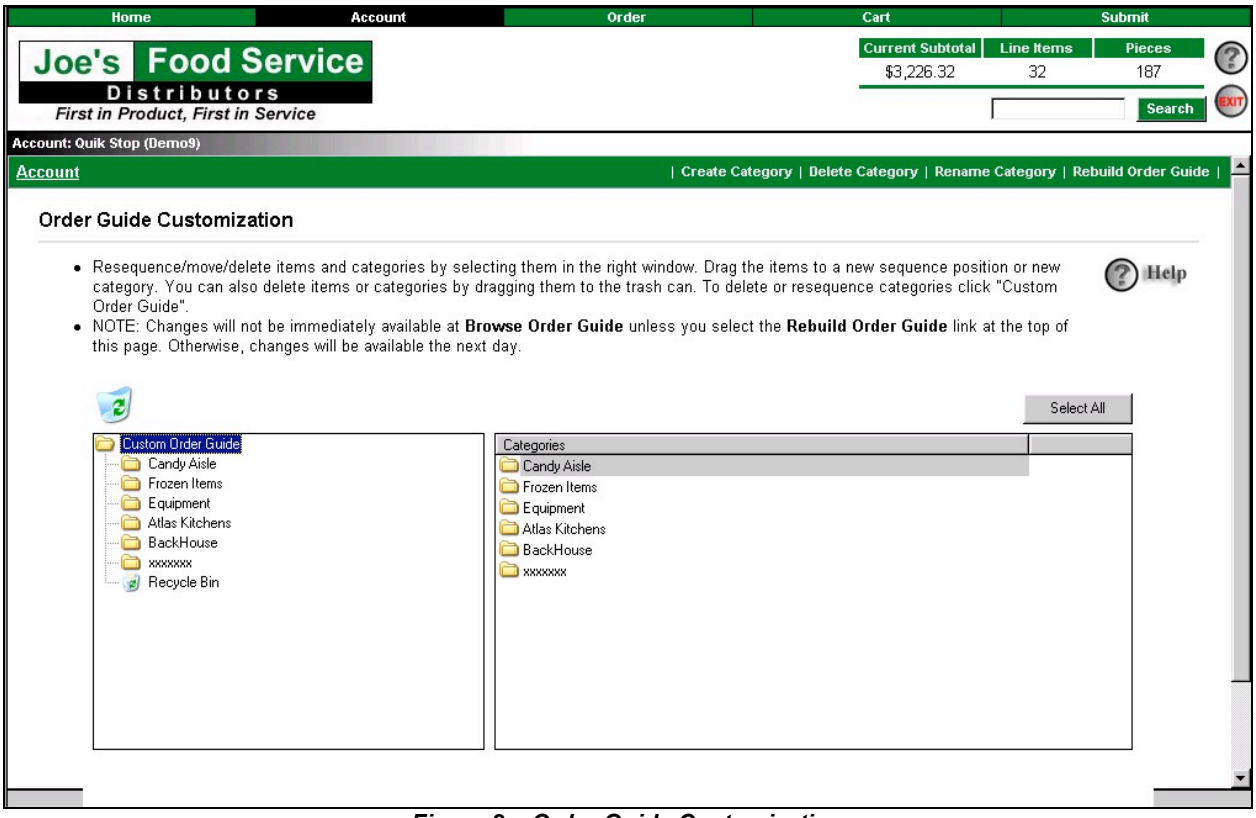


Figure 2 – Order Guide Customization

Order Guide Categories

Several modifications can be made to Order Guide Categories:

1. Create New Category(s)
2. Delete Category(s)
3. Rename Category(s)
4. Resequence Category(s)

Screen layouts and headings may not be identical to your system.

Create New Category

To Create a New Category, click on the **Create Category** link at the top of the page and a pop-up window will appear to enter the name of the New Category. (*See Figure 3*)

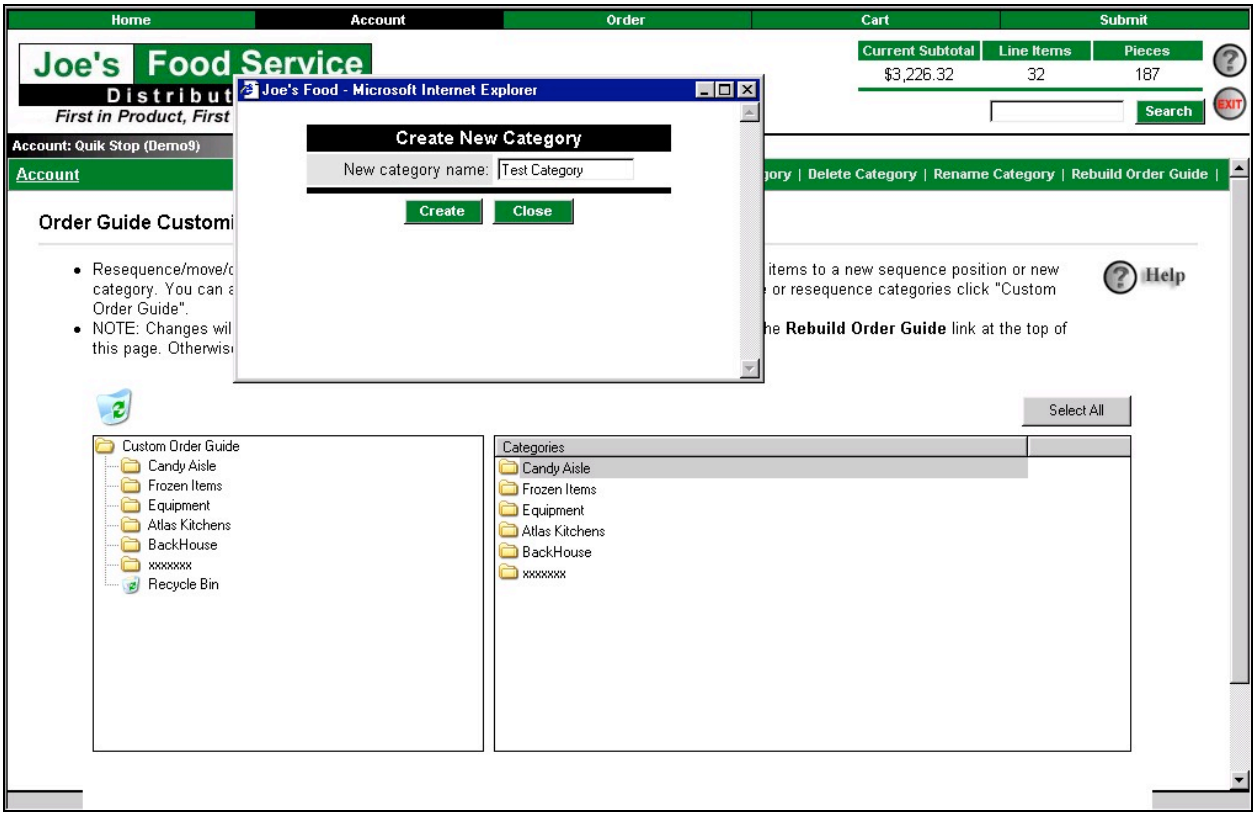


Figure 3 – Create New Category

Enter the name of the new category and click **Create**. A confirmation that the category was created successfully will appear in the pop-up window. The screen will refresh and the new category will be added as the last category on the screen.

Screen layouts and headings may not be identical to your system.

Delete Category

To Delete a Category, click on the **Delete Category** link at the top of the page and a pop-up window will appear to select the Category to Delete. (*See Figure 4*)

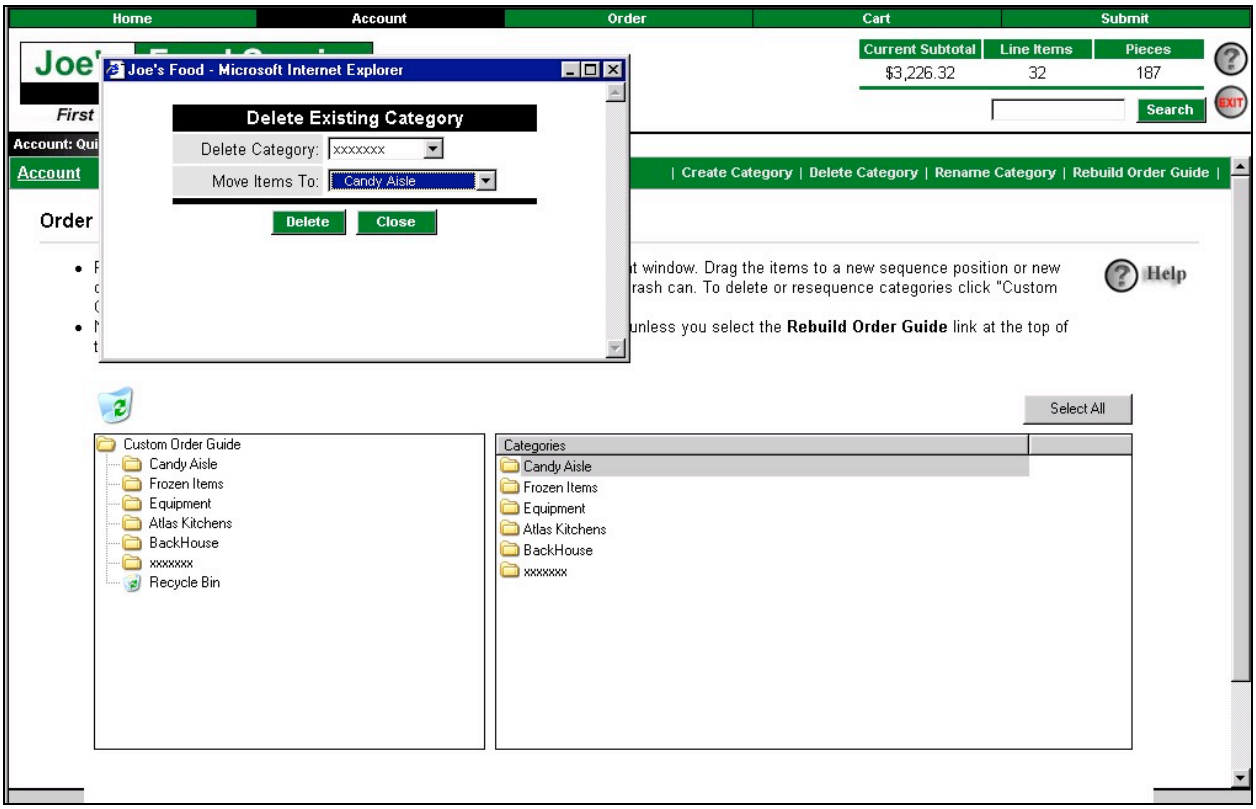


Figure 4 – Delete Category

Select the category to be deleted from the drop down menu. Items contained within that category can either be moved to another category or the items can be deleted along with the category. To move items to another category, select the desired category from the drop down menu. To delete the items along with the category, select the **Delete selected items** option in the drop down menu.

Click on the **Delete** button and a confirmation that the category was deleted successfully will appear in the pop-up window. The screen will refresh and the category will be deleted. If items were moved to another category, the items will be added at the end of the category.

Screen layouts and headings may not be identical to your system.

Rename Category

To Rename a Category, click on the **Rename Category** link at the top of the page and a pop-up window will appear to select the Category to Rename. (*See Figure 5*)

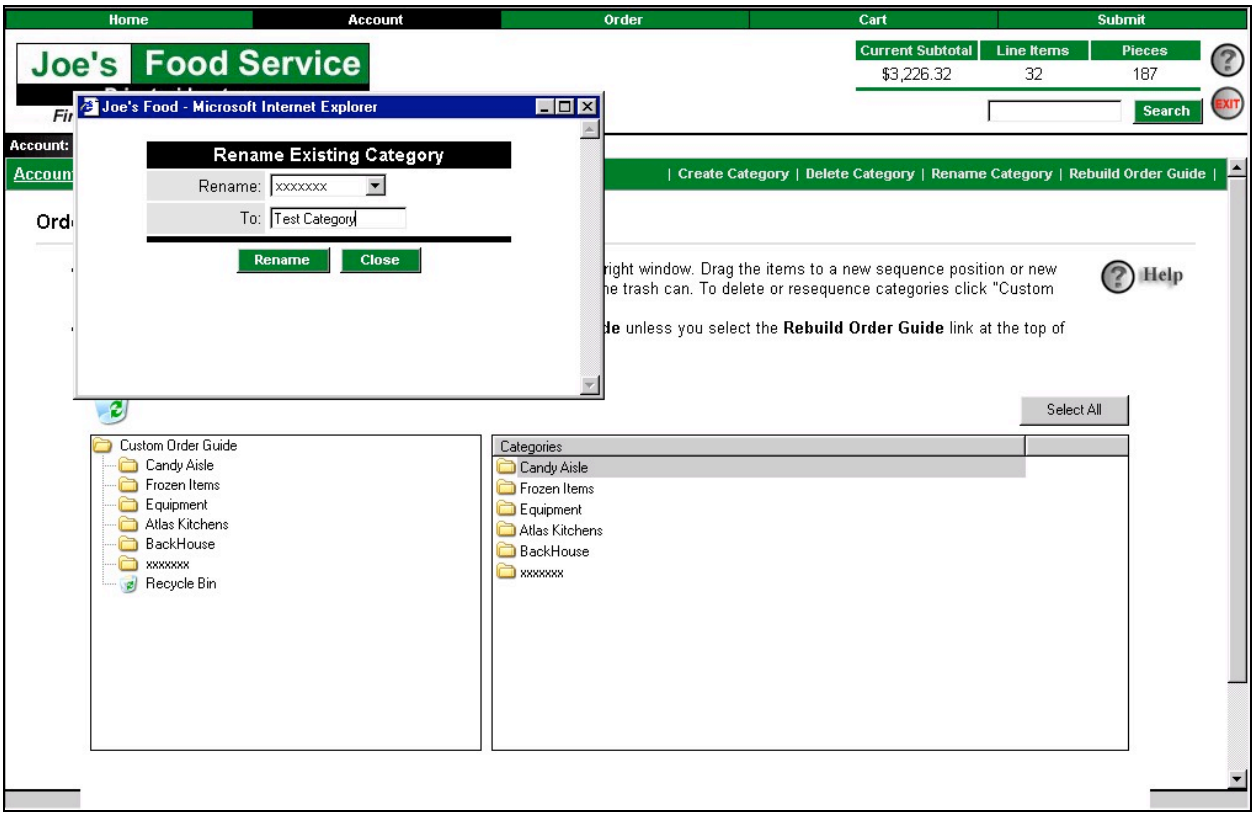


Figure 5 – Rename Category

From the drop down menu, select the desired category to rename. Enter the new category name in the **To** field and click on **Rename**. A confirmation that the category was modified successfully will appear in the pop-up window. The screen will refresh and the category will be renamed.

Screen layouts and headings may not be identical to your system.

Re-sequence Category

To modify the Category order, in the right box, click and hold down the left mouse button on the category description you wish to re-sequence. Next, drag the Category Description up or down to its new location. Once you have the category in the correct sequence, let go of the mouse button. The category will be in its new location. (*See Figure 6*)

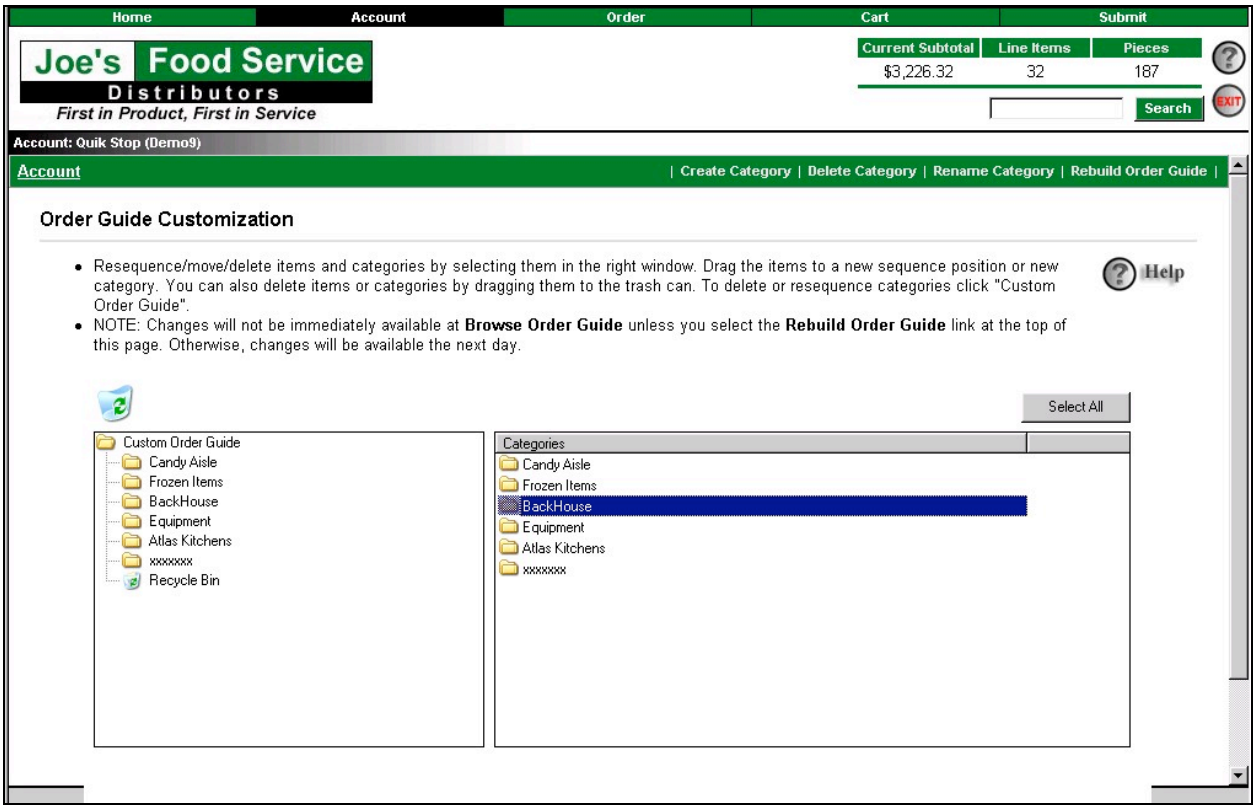


Figure 6 – Resequence Category

Screen layouts and headings may not be identical to your system.

Item Customization

Several modifications can be made to Items within the Order Guide:

1. Delete Item(s)
2. Move Item(s)
3. Resequence Item(s)
4. Add Item(s) from the Catalog

To access the items within a category, in the left box, click on the desired category name to have the items of this category displayed in the right box. *(See Figure 8)*

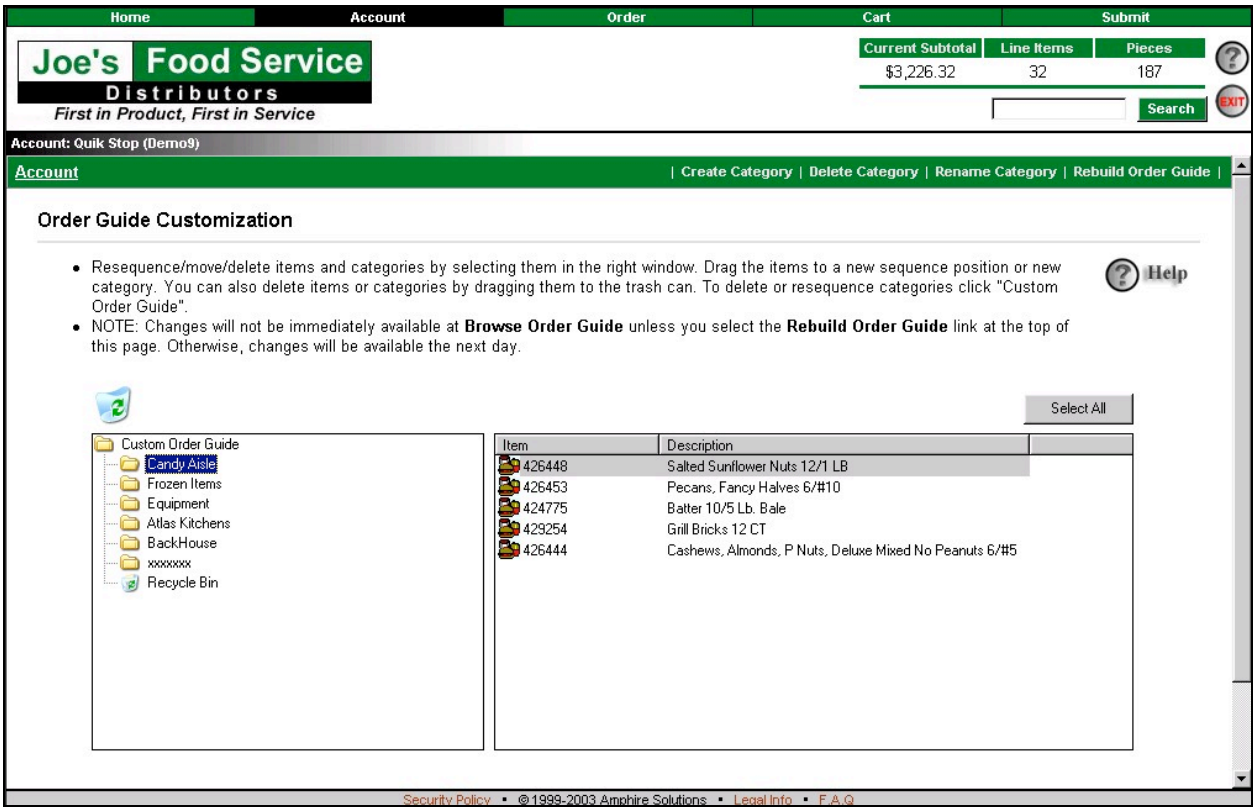


Figure 8 – Custom Order Guide Items

Screen layouts and headings may not be identical to your system.

NOTE: Item changes (Delete, Move, Resequence, Add) will not be displayed immediately in the **Browse Order Guide/Catalog** screen under the **Order** option unless the **Rebuild Order Guide** option is selected after the changes are made. Otherwise, the changes will be reflected the next day.

Delete Item

To Delete an Item from a category, click and hold down the left mouse button on the item you wish to delete. Next, while holding down the mouse button, drag the item to the Recycle Bin in the left box. Let go of the mouse button when you have the item dragged on top of the Recycle Bin. This will move the item from the category to the Recycle Bin *(See Figure 9)*

Once an item has been deleted to the Recycle Bin, the item will not be available to order. The item will also not be found if a search is performed using the Search feature. Items can be restored from the Recycle Bin. See page 14 for details.

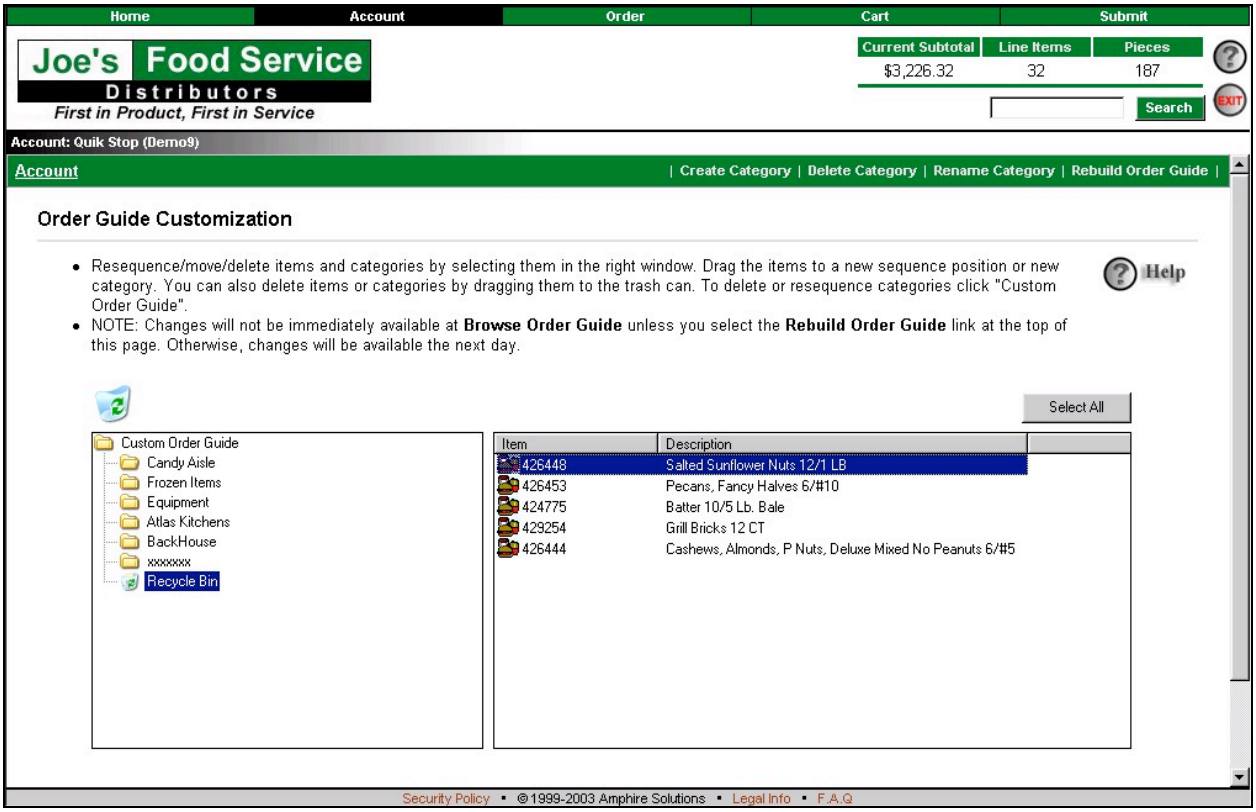


Figure 9 – Delete Items

Screen layouts and headings may not be identical to your system.

Move Item

To move an Item from one Category to another, click and hold down the left mouse button on the item you wish to move. Next, while holding down the left mouse button, drag the item to the category within the left box you wish to move the item to. Once on top of the category, let go of the mouse button. The item will be moved to the new category *(See Figure 11)*

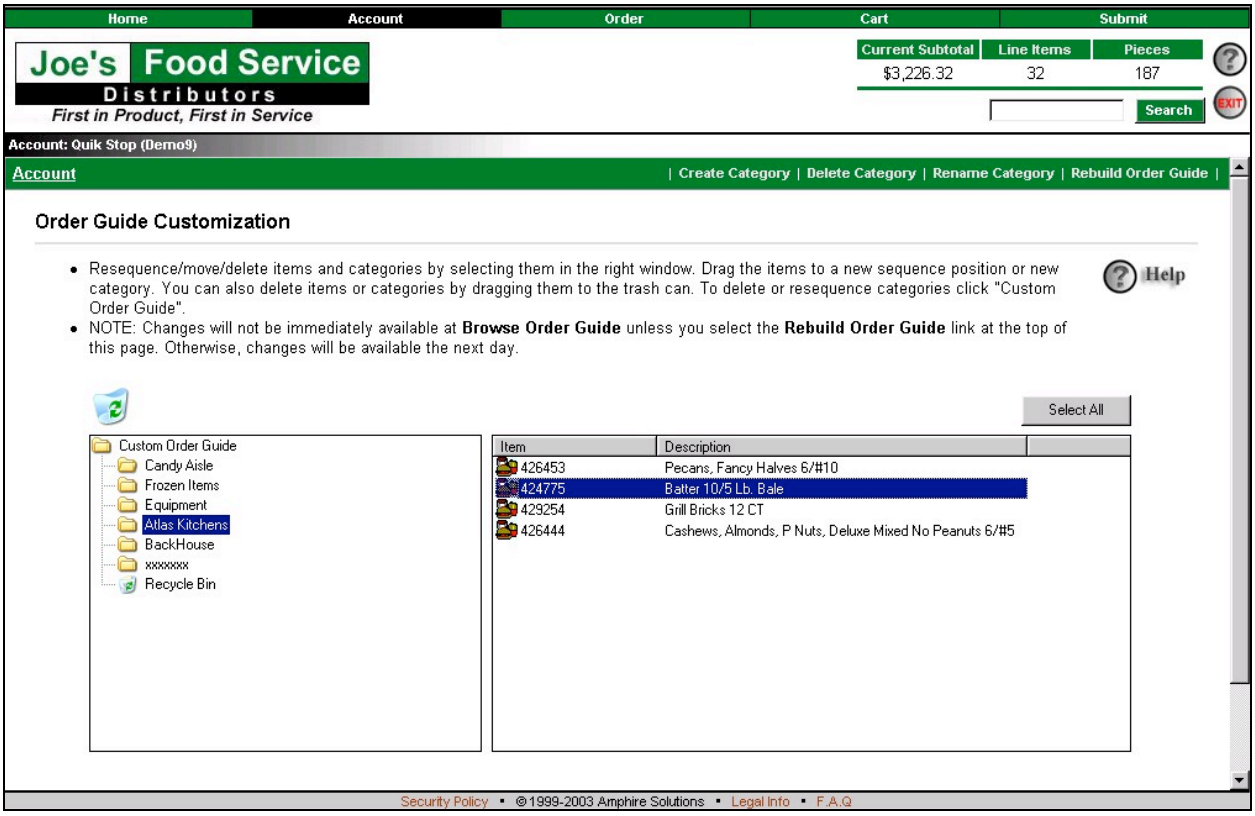


Figure 11 – Move Items

Screen layouts and headings may not be identical to your system.

Re-sequence Item within a Category

To re-sequence an Item within the current category, click the left mouse button on the item you wish to move. Next, while holding the left mouse button down, move the item either up or down to its new location. Once you have the item in its new location, let go of the left mouse button. The item is now in its new location within the Category. *(See Figure 14)*

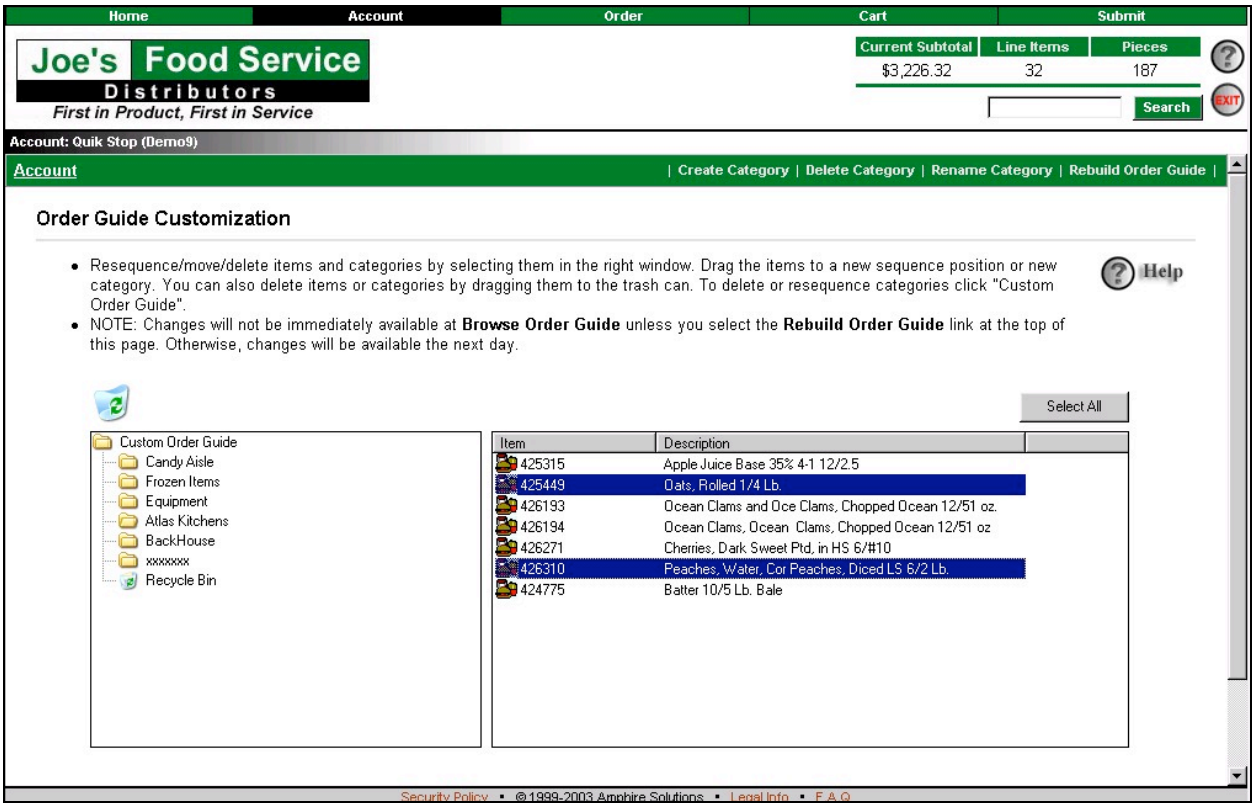

Home
Account
Order
Cart
Submit
Joe's Food Service
Distributors
First in Product, First in Service
Current Subtotal
Line Items
Pieces
$3,226.32
32
187
Search
EXIT
Account: Quik Stop (Demo9)
Account
| Create Category | Delete Category | Rename Category | Rebuild Order Guide |
Order Guide Customization
Resequence/move/delete items and categories by selecting them in the right window. Drag the items to a new sequence position or new category. You can also delete items or categories by dragging them to the trash can. To delete or resequence categories click "Custom Order Guide".
NOTE: Changes will not be immediately available at Browse Order Guide unless you select the Rebuild Order Guide link at the top of this page. Otherwise, changes will be available the next day.
Help
Select All
Custom Order Guide
Candy Aisle
Frozen Items
Equipment
Atlas Kitchens
BackHouse
xxxxxxx
Recycle Bin
Item
Description
425315 Apple Juice Base 35% 4-1 12/2.5
425449 Oats, Rolled 1/4 Lb.
426193 Ocean Clams and Oce Clams, Chopped Ocean 12/51 oz.
426194 Ocean Clams, Ocean Clams, Chopped Ocean 12/51 oz
426271 Cherries, Dark Sweet Ptd, in HS 6/#10
426310 Peaches, Water, Cor Peaches, Diced LS 6/2 Lb.
424775 Batter 10/5 Lb. Bale
Security Policy • ©1999-2003 Amphire Solutions • Legal Info • F.A.Q.

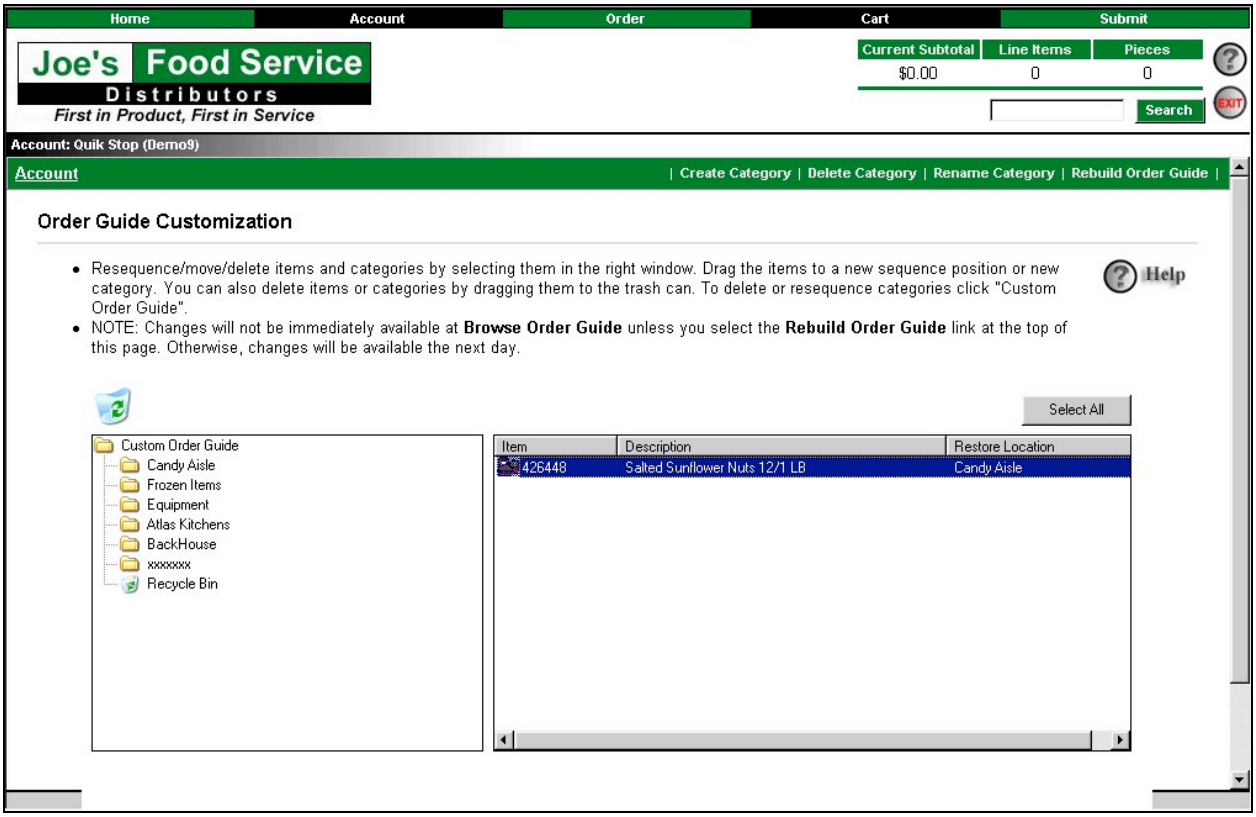
Figure 14 – Resequence Items

Screen layouts and headings may not be identical to your system.

NOTE: Item changes (Delete, Move, Re-sequence, Add) will not be displayed immediately in the **Browse Order Guide/Catalog** screen under the **Order** option unless the **Rebuild Order Guide** option is selected after the changes are made. Otherwise, the changes will be reflected the next day

Restoring an item from the Recycle Bin

To restore an Item from the Recycle Bin, click the left mouse button on the Recycle Bin category located in the left box. This will load all items within the Recycle Bin in the right box. Click the item you wish to restore to highlight it. Next, click the right mouse button with your mouse pointer over the highlighted item. A 'Restore Item' box will appear. Click the 'Restore Item' and the item will be restored to the category that it was assigned to. (See Figure 15)


Home
Account
Order
Cart
Submit
Joe's Food Service Distributors
First in Product, First in Service
Current Subtotal
Line Items
Pieces
$0.00
0
0
Search
EXIT
Account: Quik Stop (Demo9)
Account
| Create Category | Delete Category | Rename Category | Rebuild Order Guide |
Order Guide Customization
Resequence/move/delete items and categories by selecting them in the right window. Drag the items to a new sequence position or new category. You can also delete items or categories by dragging them to the trash can. To delete or resequence categories click "Custom Order Guide".
NOTE: Changes will not be immediately available at Browse Order Guide unless you select the Rebuild Order Guide link at the top of this page. Otherwise, changes will be available the next day.
Help
Select All
Custom Order Guide
Candy Aisle
Frozen Items
Equipment
Atlas Kitchens
BackHouse
xxxxxxx
Recycle Bin
Item
Description
Restore Location
426448
Salted Sunflower Nuts 12/1 LB
Candy Aisle

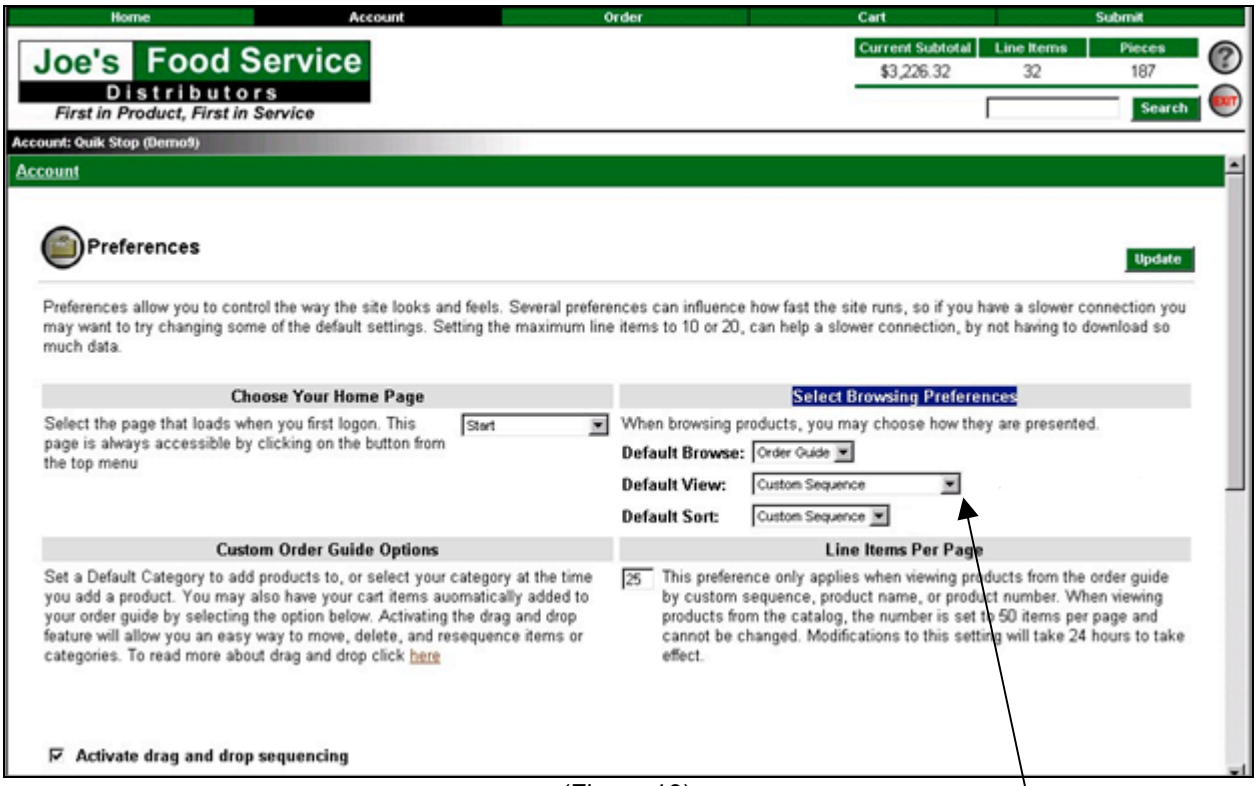
(Figure 15)

Screen layouts and headings may not be identical to your system.

Custom Sequence Order Guide Default

To set your Web Order Entry account so that your Order Guide will always default to your Customized Order guide, you will need to set your "**Select Browsing Preferences"** to **'Custom Sequence'.** To do this, select '**Account**', Select '**Preferences**'.

Under the **'Select Browsing Preferences',** change both the **'Default View'** and **'Default Sort'** to **'Custom Sequence'**. (See figure 16)


Home
Account
Order
Cart
Submit
Joe's Food Service
Distributors
First in Product, First in Service
Current Subtotal
Line Items
Pieces
$3,226.32
32
187
Search
Account: Quik Stop (Demo9)
Account
Preferences
Update
Preferences allow you to control the way the site looks and feels. Several preferences can influence how fast the site runs, so if you have a slower connection you may want to try changing some of the default settings. Setting the maximum line items to 10 or 20, can help a slower connection, by not having to download so much data.
Choose Your Home Page
Select the page that loads when you first logon. This page is always accessible by clicking on the button from the top menu
Start
Select Browsing Preferences
When browsing products, you may choose how they are presented.
Default Browse:
Order Guide
Default View:
Custom Sequence
Default Sort:
Custom Sequence
Custom Order Guide Options
Set a Default Category to add products to, or select your category at the time you add a product. You may also have your cart items auomatically added to your order guide by selecting the option below. Activating the drag and drop feature will allow you an easy way to move, delete, and resequence items or categories. To read more about drag and drop click here
Line Items Per Page
25
This preference only applies when viewing products from the order guide by custom sequence, product name, or product number. When viewing products from the catalog, the number is set to 50 items per page and cannot be changed. Modifications to this setting will take 24 hours to take effect.
Activate drag and drop sequencing

(Figure 16)

Once you have changed both the '**Default View'** and '**Default Sort'** to '**Custom Sequence'**, then click the '**Update**' button on the top right of the screen. This will save your new order guide preference. Now every time you open your order guide using the '**Order From Catalog / Order Guide'** option, your order guide will be sorted in the way that you customized it.

Screen layouts and headings may not be identical to your system.

New and Deleted Items

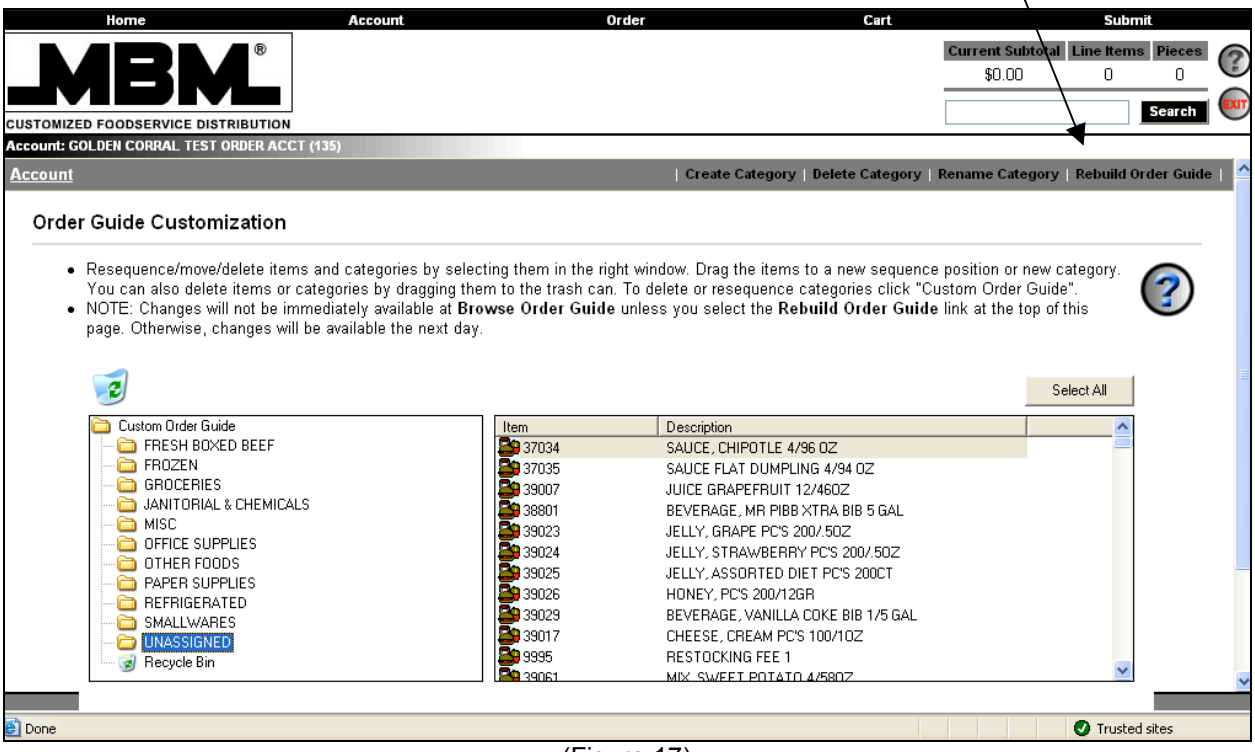
When an item number is deleted by MBM, the deleted item is automatically deleted from your order guide.

New items will automatically be added to your '**Unassigned**' category. When a new item is added to your Unassigned category, you will need to move it from your Unassigned category to the category of your choice.

To move an item out of your Unassigned category, first click on the "UNASSIGNED" folder in the left box. Second, in the right box, click the item you wish to move once to highlight the item. Then with your mouse, click and hold the left mouse button on the highlighted item and drag it over to the folder you wish to move the item to in the left box. Once you have dragged the item to the folder and the folder highlights, release your left mouse button. (see Figure 17)

Once you have finished moving all items, remember to click on the '**Rebuild Order Guide**' option. This will apply your changes to your Custom Order Guide.

It is recommended to keep your Unassigned category empty of items. Keeping the category empty will help you recognize when new items are added to the system.


Home
Account
Order
Cart
Submit
MBM
CUSTOMIZED FOODSERVICE DISTRIBUTION
Current Subtotal
Line Items
Pieces
$0.00
0
0
Search
EXIT
Account: GOLDEN CORRAL TEST ORDER ACCT (135)
Account
Create Category | Delete Category | Rename Category | Rebuild Order Guide
Order Guide Customization
Resequence/move/delete items and categories by selecting them in the right window. Drag the items to a new sequence position or new category. You can also delete items or categories by dragging them to the trash can. To delete or resequence categories click "Custom Order Guide".
NOTE: Changes will not be immediately available at Browse Order Guide unless you select the Rebuild Order Guide link at the top of this page. Otherwise, changes will be available the next day.
Select All
Custom Order Guide
FRESH BOXED BEEF
FROZEN
GROCERIES
JANITORIAL & CHEMICALS
MISC
OFFICE SUPPLIES
OTHER FOODS
PAPER SUPPLIES
REFRIGERATED
SMALLWARES
UNASSIGNED
Recycle Bin
Item
Description
37034 SAUCE, CHIPOTLE 4/96 OZ
37035 SAUCE FLAT DUMPLING 4/94 OZ
39007 JUICE GRAPEFRUIT 12/46OZ
38801 BEVERAGE, MR PIBB XTRA BIB 5 GAL
39023 JELLY, GRAPE PC'S 200/.5OZ
39024 JELLY, STRAWBERRY PC'S 200/.5OZ
39025 JELLY, ASSORTED DIET PC'S 200CT
39026 HONEY, PC'S 200/12GR
39029 BEVERAGE, VANILLA COKE BIB 1/5 GAL
39017 CHEESE, CREAM PC'S 100/1OZ
9995 RESTOCKING FEE 1
39061 MIX, SWEET POTATO 4/58OZ
Done
Trusted sites

(Figure 17)

Screen layouts and headings may not be identical to your system.